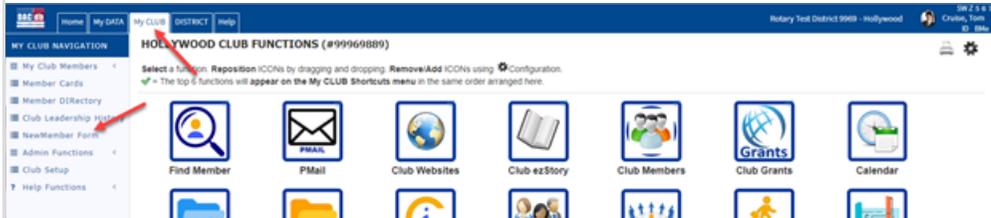


Use the "Search" field at the top right to search for a help topic.

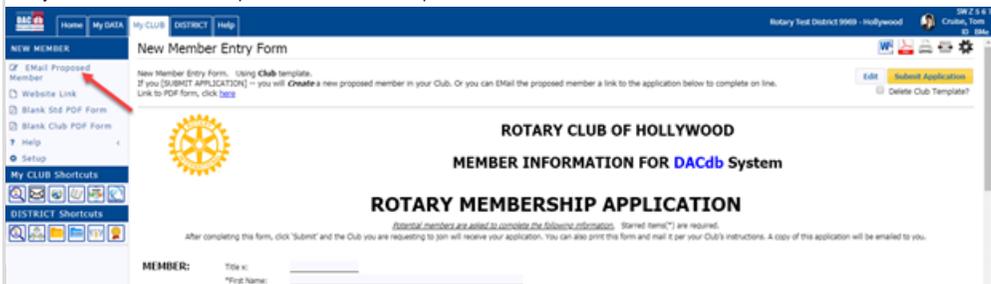
## HOW TO USE THE NEW MEMBER FORM WITH THE ADDITION OF THE CRM MODULE

This should probably be titled the New Member Form for Proposed and Potential New Members. This form is basically sent to people who have been approved by the club for membership.

First you need to go to the My Club tab and click on the New Member Form on the left column



Next you click on the Email Proposed Member on the top left.



You now need two pieces of information if this is a person who is not in the CRM module. You need their first name and their email address. If they are in the CRM module, then you just need to type at least part of their last name to have the information entered in the body of the Pmail correctly. The major reason for this change is that if the club is using the CRM module, they are already in the system and it was causing an issue with creating two new members.

### Send Email to New, Proposed or Potential Member

Send the New/Proposed member the New Member Entry Form.  
You are about to send this to a NEW Member -- that is not yet in your Club.

Cancel Send Email

If the potential member is already in the system (e.g., they are being managed in the CRM module or under your Potential Member tab), then look up their name by entering 1 to 2 characters of their last name. More than one member can be addressed, but only if their records exist in the system. Each will be sent a personalized link to their existing record to be updated. Doing this will avoid creating a duplicate record in the system.

If you are sending the application to a potential member that is NOT already in the system, then enter their email address below. However, since we do not know their first name (or nick name), you will need to replace the tag (%FName%) in the message below with their name.

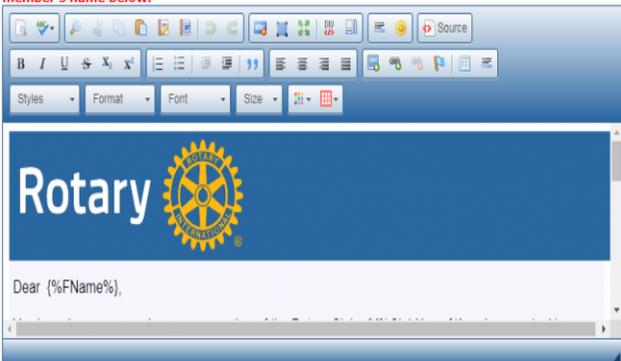
**NOTE:** If you do not replace the (%FName%), "New Member" will be used - so the salutation will read: "Dear New Member". When the member receives the form, enters their new information, a new member record will be listed under the Potential Member tab in My Club.

To:

Subject:

**If sending to a NEW MEMBER, please change the {%FName%} variable below to the new member's name below!**

Message:



Now when the proposed or potential member receives the email and when they click on here, they will open up the new member form. When they finish filling it out and submit it, the secretary will receive and email that this has been sent and there will be a new Proposed tab on the top of the club member list.

All Club members are listed under one of the three tabs below based on their MemberTypes or Terminated status.  
 Club Leaders can be added (or removed) to this display, by turning them on using the configure ICON at the top right and the "Show Club Officers" to Yes (or No).

Edit PHF/SM Add New Member Edit Club  
 Submit Attendance

Active/Honorary Members									
#	Action	Member Name	Member Type	Club Position	Home Phone	Office Phone	Cell Phone	E-Mail	
1			Active						
2			Active	Treasurer					

Then you will need to click on the proposed new member's pencil and make some edits

Active/Honorary Members									
#	Action	Member Name	Member Type	Terminated Date	Terminated Reason	Death Date			
1			Proposed						

Now when the member is inducted, you just need to click on the Proposed tab and click on the pencil of the proposed member. Then on the information page that comes up, you change the member type from Proposed to Active, put in the start date (which cannot be more than 30 days). It is also a good idea to click on the Contact tab and make sure the email address and address information is correct and that the preferred email and address are selected.

Member Admin: John Depp id=800692583  
 D-9969 Hollywood (#99969889)

The RI Interface is set to OFF. Any changes you make here will be made in DACdb but will not be updated in RI. If you want your changes to be sent to RI, please setup the integration, by following the instructions found here.

Cancel Terminate Update

Member Photo Contact Spouse Business PData Club Login Alumni ...

Member Information

Member Information:

Rotary ID: 0 Also known as "MemberID"

Member Type: Proposed **1**

Prefix:

First Name: John

Middle Name:

Last Name: Depp

Suffix:

Previous Name: Former Name or Maiden Name

Gender: Male

Badge Information:

Badge/Nick Name: (Only put in a Badge Name if you have one)

Badge Title: Title you want to appear on Event Badges

Badge Number:

Other Information:

Start Date: (mm/dd/yyyy) Admission/Start Date in this Club! If there are previous years in another club, enter those years under the Club Tab

Birth Date: (mm/dd/yyyy) - year optional, but necessary for calculating the club's demographics correctly

Note: The DOB year, if entered, is only visible to the member and the few club officers who can edit member info, to all others it is hidden.

Change Proposed to Active

Put in start date and can't be more than 30 days old

3

This will now move the member over to the Active/Honorary tab on the club and move them into the Member Compare on the RI Integration page. It is highly recommended that you go in on this page a day or two later and make sure that this person has rolled up to RI and is on the list in alphabetical order.